Agenda BHL-Europe Annual Review Meeting

(June 7-10 2011, NBGB/ Meise, RMCA/ Tervuren, Belgium)

Monday, 6 June 2011

*19:00 organised dinner: **La Vignette***

Tuesday, 7 June 2011 – NBGB, Meise

8:30 Bus shuttle to Meise
Meeting point: Hotel Rastelli, Tervuren

Bouchout Castle, Main Entrance Hall

09:15   Registration

Salon du Brabant

09:30-11:45   PMG Meeting

11:45-12:30   open PMG Meeting

Coffee available in Salon du Brabant and the Main Entrance Hall

09:30-12:30   Guided tours to the Botanical Garden
                          [*Régine Fabri, Nicole Hanquart*]

                          <u>Meeting point</u>: Bouchout Castle, Cour d'honneur

Salons de l'Impératrice

12:30-14:00 Lunch Break

Salon du Brabant

14:00-14:15   Plenary and Introduction to afternoon sessions [*Henning*]

14:15-15:30   Parallel Workshops

Workshop (1)	Workshop (2)
Salon du Blanc	Salon du Brabant
Collection Policy Workshop	Evaluation and Testing Workshop
[*Michaela, Melita*]	[*Andreas, Jiri*]

15:30-15:45 Coffee Break

15:45-17:30   Parallel Workshops

Workshop (1)	**Workshop (2)**
Salon du Blanc	Salon du Brabant
Collection Policy Workshop	Evaluation and Testing Workshop
[*Michaela, Melita*]	[*Andreas, Jiri*]

17:30-18:30   **Guided tours**: Library and Scanning facilities [*Jean, Nicole*]

Meeting point: Bouchout Castle, Cour d'honneur

(There will be 2 groups leaving from the meeting point)

Free visit of the Botanical Garden & Greenhouses

18:40 Meeting point: Main Entrance of the NBGB

*19:00 organised dinner: **De Voile Rouge (only cash)***

22:00 Bus shuttle to Tervuren (at the Main Entrance of the NBGB)

Wednesday, 8 June 2011 – RMCA, Tervuren

Review Meeting

Front Entrance of the CAPA building, elevators to the left, 3rd floor

9:00   Registration

BHL-Eu room 1

09:45-09:50   Welcome and Introduction [*Marcel*]
Context, purpose and objectives of the review

09:50-10:00   Short overview of the project and its objectives incl. target
users/needs [*Henning*]

Presentation of the work performed during the activity period(s) to be reviewed including difficulties encountered and remedial actions.

10:00- 10:20   Content analysis/ Content available through Europeana/ statistics/
indicators [*Melita*]

Best practice guidelines & standards (1st version) [*Melita*]

Web-database content management (GRIB) [*Melita*]

10:20-10:40   Harmonisation of metadata/final schema [*Graham*]

BHL-Europe Portal – components (Technical architecture)
[*Graham*]

10:40-10:45   IPR status [*Graham*]

10:45-10:55	Performance indicators [*Henning*]
10:55-11:13	Dissemination and awareness activities [*Jiri*]

- User involvement and their feedback
- Virtual exhibition
- Project website

11:13-11:31	Impact [*Henning*]

- Changes and benefits of the project for the project participants, for content providers and in particular for target users
- BHL-Europe in the BHL community (articulation)
- External collaborations (e.g. Alexandria)
- First overview of the exploitation of the results and sustainability (long-term sustainability)

11:31-11:41	Work plan for the next period [*Henning*]
11:41-12:41	Question & Answer session

12:45-13:30 Lunch Break

13:30-13:50	Meeting to discuss initial impressions and preliminary conclusions (closed) [*Marcel, Marilia, Kenneth*]
BHL-Eu room 1	
14:00-14:15	Preliminary feedback to the consortium on review conclusions [*Marcel, Marilia, Kenneth*]
14:15-14:20	Closing remarks [Marcel]
14:20	Free visit of the Royal Museum of Central Africa (RMCA)

Courtyard of the Main Building

19:00 organised dinner: **African Dinner at RMCA** *(contribution 25 EUR)*

Thursday, 9 June – RMCA/ Tervuren

Hall of the 3rd floor, next to the meeting rooms, elevators to the left, 3ʳᵈ floor

9:00 Coffee

BHL-Eu room 1

09:15-09:30	Recap of Review meeting and general announcements [*Henning*]
09:30-09:45	Update on Europeana [*Lizzy*]
09:45-09:55	Update on Global BHL [*William*]
09:55-10:00	Split up for Workshops

10:00-12:30   Parallel Workshops

Workshop (3)	**Workshop (4)**
BHL-Eu room 2	**BHL-Eu room 3**
Content Provider Workshop [*Melita*]	Dissemination Workshop [*Jiri*]
• Ingest & Mapping [*Bernd, AIT]*	
• Mapping [*Wolfgang*]	

12:30-13:30 Lunch Break

13:30-16:00   Parallel Workshops

Workshop (3)	**Workshop (5)**	**Workshop (6)**
BHL-Eu room 2	**BHL-Eu room 3**	**BHL-Eu room 1**
Content Provider Workshop [*Melita*]	Business Development Workshop [*Henning*]	Portal Development Workshop [*Lee, Lola*]
• GRIB [*Boris, VZG*]		• Evaluation, Feedback & Review

16:00-16:30 Coffee Break

BHL-Eu room 1

16:30-17:00   Plenary – outcomes of Workshops, Q&A, plans and wrap up

19:00 organised dinner: **Le Chalet Vert**

Friday, 10 June – RMCA/ Tervuren

9:00 Coffee

09:30-12:30   Parallel Workshops

(6) 09:30-10:45 **(7)** 09:30-12:30	**Workshop (6)**	**Workshop (7)**
	BHL-Eu room 2	**BHL-Eu room 3**
	Portal Development Workshop [*Lee, Lola*]	Best Practice Guide Workshop [*Michaela, Melita*]
	• Portal Review • Open TMB	

Closed TMB Meeting

11:00-12:00	Distribution of tasks for developers to support the ongoing Portal Development work:

- Creation of Drupal Modules
- Collaboration with Sp2000 to configure/integrate CoL Databases/Webservices for the Portal [*NHMW*]

12:00-13:00	Shared Development Environment [*Lee, Hengdi*]

- GitHub Session and branching strategy [*Hengdi*]

12:30-13:30 Lunch Break/ Working Lunch with sandwiches

13:30-14:30	Continuation of Shared Development Environment [*discussion*]

- Feedback from group on current process implemented by Atos (this includes: Code Testing feedback and debates on Test Data). [*open discussion*]

14:30-15:00	Preparation for next deliverable – D3.8 [*Graham, Chris Sleep*]

- Determine Scope of work
- Responsibilities and timelines

15:00-15:45	Environment Strategy & Planning [*Atos, Techgroup*]

- Other environments to consider as part of Industrialising the Development Process e.g. Staging environment, pre-production, production, load testing
- Development testing, Unit Testing, Functional Testing, UAT. Things to consider:
  - o workflow for Bug fixing (do we have a QA Manager?)
  - o QA Control of the Portal Development
  - o Technical Testing Phase (Test Plan/Test Scripts)

15:45:16:00	Summary & AOB [*Graham*]

*19:00 organised dinner: **T'Park***

Workshop descriptions

PMG meeting/ Open PMG Meeting (Henning) - 7 June 2011, Meise
The goal of the meeting is to prepare the annual review meeting, align the presentations of the WP leaders and identify potential questions of the reviewers. If time allows we also review the work plans and the risk and issue register. The meeting is for PMG members only.
In the Open PMG Meeting upcoming questions will be discussed with experts.

(1) Collection Policy Workshop (Michaela, Melita) - 7 June 2011, Meise
Goal: Agreement on a BHL-Europe Collection Policy.
The Collection Policy will be a chapter of the Approved Best Practice Guidelines and Standards[1]. A short introduction to the topic and a follow-up discussion of the provided examples on Collection Policy[2] is planned. Furthermore, the most important points will be defined which have to be considered in terms of Collection Policy and also for the inclusion in the BPG. Very important is also the launch of an alphabetical list of core and supporting themes – similar to BHL-US's Collections diagram[3].

Agenda Collection Policy[4]

(2) Evaluation and Testing (Andreas, Jiri) - 7 June 2011, Meise

We have to do a user evaluation on the prototype of the BHL-Europe system, which is currently under development to fulfil our contractual obligations (user evaluation report is a deliverable for October). This workshop is to decide on the various testing approaches (including the technical testing) and identify responsibilities. It has to be decided what approach we use for the user evaluation. It might be difficult to run a user survey as we did last year. It would be more appropriate to have a usability test. This needs to be discussed in more detail and the implications need to be evaluated. We then need to design the user evaluation in more detail and identify the people setting up the user evaluation by end of August. Another workshop is planned for end of August to finalise the user evaluation preparation and align it with the development progress.

(3) Content Provider Workshop (Melita) - 9 June 2010, Tervuren

Ingest & Mapping
Pre-Ingest (Bernd):
This workshop aims at giving an introduction to the Pre-Ingest tool. A step-by-step tutorial is planned in order to instruct all content providers how to use the Pre-Ingest tool for the ingestion of content after content has been uploaded to the NHM server. Examples for the Pre-ingest guidelines will be discussed in addition. The Pre-Ingest tool will be part of the BHL-Europe ingest process after this workshop and content providers will be asked to use the tool after uploading content in order to trigger the ingest process.

Mapping Workshop (Wolfgang):
This workshop will introduce the developed mapping tool in order to give content providers the opportunity to create their mapping of their metadata to the OLEF schema (= BHL-Europe schema) themselves.

GRIB (Boris, Andreas Krausz - VZG):
This workshop will give an update on the GRIB. The functionalities and the use of the GRIB will be explained to the content providers.

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[1] https://bhl.wikispaces.com/BHLE_WP2_BPG
[2] https://bhl.wikispaces.com/BHLE_WP2_CoPo
[3] https://bhl.wikispaces.com/BHL+Collections+Diagram
[4] https://bhl.wikispaces.com/file/view/Agenda+Collection+Policy_Meise.pdf

(4) Dissemination Workshop (Jiri) - 9 June 2011, Tervuren

We welcome everybody of the project to share ideas about dissemination activities for BHL-Europe. In the last year of the project dissemination will be a very important tool to attract new users for the BHL-Europe portal. We are quite sure about the use of BHL-Europe in the scientific community; however we need to target also the general public in Europe. One of the main achievements in the last year of BHL-Europe was the set-up and design of BHL-Europe's virtual exhibition, BLE. The first exemplary virtual exhibition on 'Spices' will be presented. It aims to attract new users for the BHL-Europe portal, especially non scientific users. More virtual exhibitions are planned for the future and your input is welcome.

Discussion items:

- Project Website (multilingualism)
- Google analytics
- BHL-Europe folders, bags, new (more elaborated) version of the flyer
- Facebook
- Promotion of project results: Best Practice Guide of BHL-Europe
- e-learning platforms as a new electronic dissemination tool
- Negotiation with ministries of education in each partner country
- How shall we attract public users and make BHL-Europe better known?

(5) Business development Workshop (Henning) – 9 June 2011, Tervuren

Everybody must be aware of our overview business plan D1.5. The next workshop in June is going to develop further on that document. During the workshop I would like to kick-off the following three steps and processes:

- After having identified the potential strategic directions we need to identify funding options to be able to decide what the best option is we aim if we don't have continuing project funding. One important question in that context is: Which partner is able to commit for a continuous engagement in BHL-Europe with in kind contribution from the institution? Another question revolves around future projects and potential funding streams, objectives and partners for such projects. In particular for these questions we ideally need the appropriate people from the partner institutions around the table that are involved in decision making processes of the individual partner institution.
- Environmental scan: we need to better understand competitors, technological innovations, behaviour of our users. In this context it would also help to get a view on the Global BHL future developments. Europeana can hopefully help giving an insight into the results of the Europeana user research.
- Marketing plan: We need to think about the products of BHL-Europe and the potential of these products on the market. We need to think about goals for the future development and key performance indicators to measure our success. If we have marketing experts in our consortium, they are welcome to this workshop to share their expertise with us.

(6) Portal development Workshop (Lee, Lola) – 9 & 10 June 2011, Tervuren

Portal Development Workshop - Evaluation & Review of Portal Features implemented so far
In order to build a powerful portal for search and retrieval of biodiversity literature, we need to ensure that we have fully integrated all user needs and requirements. Hence, moving on from previous workshops/discussions whereby we incorporated content user needs and requirements we now need to ensure that we implement all core features and portal functionalities for our Public Core Release M28 and also for the final BHL-Europe System. During this workshop session we're going to start the Evaluation and Gathering of initial feedback of the Core Features Implemented to date.

9 June 2011
BHL-Europe Portal Development Workshop [Interactive Session]

- (What do we have so far?):- Walk through each of the existing Portal Features & Functionality implemented to date [AIT]
- Evaluation of Core Features implemented to date.
- Gathering of Initial feedback exercise.

10 June 2011
BHL-Europe Portal Development Workshop

Based on outcomes of above initial exercise:

- Portal Review Session: - adjust priorities as necessary; review the work completed to date and develop a roadmap for the portal moving forward.
- Open TMB session - Opportunity for people to ask general questions about the development work.

(7) Best Practice Guide Meeting (Michaela, Melita) - 10 June 2011, Tervuren

Feedback on D2.6; What to CPs expect for D2.9?
Deadlines for 2011
Presentation of the new structure of D 2.9

- Feedback from authors on this model
- BPG Discussion[5]
- Decision on new BPG structure, content/chapter amendment

BPG Agenda Workshop Tervuren[6]

Closed TMB Meeting (Graham) - 10 June 2011, Tervuren

The Closed TMB Session is for members of the Techgroup to discuss and make decisions on various aspects and ongoing work within the Development process.

Items to be discussed include:

- Shared Development Environment/ GitHub session and branching strategy
- Distribution of tasks amongst resources to support the development work (e.g. Drupal modules)
- Scope of work required for D3.8 (M30)
- Other environments to build out i.e. load testing, staging environment

Closed TMB Agenda[7]

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[5] https://bhl.wikispaces.com/BHLE_WP2_BPG_Feedback
[6] https://bhl.wikispaces.com/file/view/BPG+Agenda+Workshop+Tervuren.pdf
[7] https://bhl.wikispaces.com/BHLE_AnnualReview2_agenda